

KRALJIC ANALYSIS AUTOMATION SOLUTION


(on Microsoft SharePoint Online + Microsoft Power Automate)

1. User Guide and Operational Description of the Solution

Parameter	Value
Solution version	1.0.0.7
Solution	Kraljic Matrix Automation
Platform	Microsoft 365, SharePoint Online, Power Automate, AI Builder
Primary audience	Category Managers, Procurement Leadership, Strategy Teams
Document purpose	Explain workflow logic, scoring model, AI integration and reporting

The solution automates preparation of the Kraljic Matrix using SharePoint Online, Power Automate and AI Builder. It imports procurement category data (spend analysis) from Excel, calculates weighted business and supply risk scores, classifies categories into Kraljic quadrants, generates AI commentary and creates a visual HTML category management report.

2. Solution Scope

- Import procurement category data from Excel (standard template)  Kraljic_Input_Table.xlsx
- Calculate spend-share-based category weighting.
- Calculate weighted Profit Impact and Supply Risk scores, inclusive of AI scoring.
- Generate AI-based category management commentary.
- Generate Kraljic Matrix visualization (SNG file).
- Generate HTML report and SharePoint link
- Distribute report through Outlook email to the category manager(s)
- Save the spend analysis and this report for the audit trail.

3. Kraljic Matrix Orientation

- X-axis = Supply Risk.
- Y-axis = Profit Impact.
- Top-left quadrant = Leverage.
- Top-right quadrant = Strategic.
- Bottom-left quadrant = Non-Critical.
- Bottom-right quadrant = Bottleneck.

4. SharePoint Data Model

- Kraljic Category Assessment list stores scoring results.
- SharePoint document libraries store generated HTML reports.
- SharePoint acts as the audit repository.

5. Main Workflow Stages

- Upload Excel source file.
- Read rows from Excel table.
- Calculate total spend across all categories.
- Calculate spend share per category.
- Generate automated and AI scores.
- Assign Kraljic quadrant.
- Generate SVG matrix.
- Generate HTML report.
- Create SharePoint sharing link.
- Distribute report by email.

6. Scoring Logic

- SpendScore is calculated from spend share of total uploaded spend.
- CompetitionRiskScore measures supplier dependency.
- ManagerProfitImpact measures procurement business impact.
- ManagerSupplyRisk measures sourcing and continuity risk.
- EndUserBusinessImpact measures operational dependency.
- AIStrategicScore evaluates strategic importance using AI Builder.
- AIRiskScore evaluates supply-side exposure using AI Builder.

7. SVG Matrix Visualisation

- Bubble coordinates are dynamically calculated.
- Bubble size depends on spend share.
- Bubble colour represents quadrant classification.
- SVG rendering ensures SharePoint compatibility.
- Numeric identifiers link bubbles to the category legend.

8. AI Commentary

- AI generates category commentary.
- AI generates recommended procurement actions.
- AI generates risk signals.
- AI commentary is embedded into the final HTML report.

9. Notifications and Reporting

- HTML report file is generated automatically.
- SharePoint sharing link is generated automatically.
- Stakeholders receive email notifications with the report link.

10. Future Enhancements

- Historical trend analysis.
- Quarter-to-quarter category movement.
- Power BI dashboard integration.
- Market intelligence inputs to AI judgement.

11. Video Overview

<https://youtu.be/-KzxEF2T2OU>